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ABSTRACT

This study explores current trends and practices in functional integration based on site visits to six Association of Research Libraries (ARL) member libraries selected on the basis of their responses to a Fall 1984 ARL questionnaire. The responses indicated that, for all six libraries, some integration of functions existed, staff reorganization was underway or complete, cataloging was taking place in public areas, and professional librarians were participating in both public and technical services functions. The current situation of the six libraries and their decisions to reorganize are summarized, and the following developments and issues are considered: (1) collection management and service to users; (2) impact of automation; (3) organizational climate; (4) flexible use of staff; (5) staff morale; (6) reporting relationships; and (7) recruitment and training. Increased information delivery and an expansion outward in client-centered groupings are identified as possible future trends for public service areas, along with the continuing compression of massive technical services departments, and it is concluded that leadership and staff participation, as well as a clear sense of where the institution is going, are vital ingredients in successful organizational change. Notes and a 61-item selected bibliography are provided, and a listing of the issues addressed is appended. (KM)

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INTEGRATION OF PUBLIC AND TECHNICAL SERVICES FUNCTIONS

Observations on Organizational Change in Six Member Libraries of The Association of Research Libraries

NOVEMBER 1986

by B. J. Busch
Area Coordinator for the
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University of Alberta
Edmonton, Alberta, CANADA

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Visiting Librarian Program
Office of Management Studies
Association of Research Libraries
Washington, D.C.

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EDITOR'S COMMENTS

This publication is the first from the OMS Visiting Librarian Program, described on the following pages. The author, B.J. Busch, worked from the Office of Management Studies headquarters for five months, conducting a mail survey of ARL members and then visiting six libraries. Her stay at OMS and her travel were supported by the University of Alberta as part of a professional development leave.

In addition to this paper, Ms. Busch's work during her professional development leave resulted in SPEC Kit #112 (March 1985), an article in the RTSD Newsletter (10:3, 1985, pp.25-26), and an engagement as the keynote speaker for the 1985 joint Washington/Oregon ACRL Conference, "Changing Course: Restructuring Academic Libraries." She also presented a paper "Organizational Change in Large Academic Libraries" at the 1986 Alberta Library Conference.

Ms. Busch's learnings and observations from the mail survey and interviews with dozens of ARL staff (in both individual and group settings) are presented here, as a springboard for possible further research. Persons interested in pursuing issues and observations in this paper may contact the author at Rutherford Library North, University of Alberta, Edmonton, AB T6G 2J4, CANADA.

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This publication has been formatted and published under the auspices of the OMS. Credit for its contents remain with Ms. Busch, Visiting Librarian.

-- Maxine K. Sitts

OFFICE OF MANAGEMENT STUDIES

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VISITING LIBRARIAN PROGRAM

Reflecting an OMS commitment to continuing education and professional development, the Visiting Librarian Program has been developed in response to increasing interest by Association of Research Libraries members looking for opportunities for library staff to investigate developments in research librarianship. The Program provides an environment where library staff can study and learn about current practices and issues, and then share their observations and discoveries. By encouraging this type of study and the distribution of results, the Office hopes to encourage additional research where there is enough interest. The Visiting Librarian Program also provides guidance and instruction is such skills as surveying, interviewing, analyzing results, and preparing reports.

The first Visiting Librarian Program participant had received a paid professional development leave from her institution to study the effects of automation on reorganization of technical and public services activities. Both the Office and the librarian found the experience beneficial. The librarian received the support and advice of a national office in conducting research, designing surveys, interviewing, and writing, while the Office gained information files and publications useful to Association of Research Libraries membership.

The Office is now offering additional opportunities for visiting librarians to spend sabbaticals or other professional development leave working with OMS staff on research, publication, or development projects. The Program is fashioned as an extension of the Collaborative Research-Writing Program, and is aimed at encouraging the study of a current concern using OMS and SPEC resources, with the participant working with staff at OMS headquarters.

Visiting librarians will be responsible for developing an overall design and focus for their research (although OMS staff are available to consult with them during this phase), and for obtaining institutional support. The Office will accept applications from interested librarians, and select those projects which match with membership needs and interests.

Results can include:

* A Visiting Librarian Program paper, SPEC kit, or OMS Occasional Paper.

* Publication of results in journal articles and presentation of papers at conferences.

* A working tool (e.g., training design, self-study module) based on a home library need or problem.

BENEFITS TO PARTICIPANTS

Participants will receive OMS professional staff assistance and a national perspective in carrying out their research and writing. In the case of the first librarian, working at ARL headquarters provided a unique opportunity for contacting libraries and conducting research. The sponsoring library also reported that the information and larger perspectives gained during the program were beneficial to the organization upon the librarian's return.

PROGRAM AND APPLICATION PROCEDURES

The length of time for research projects will vary from two to six months, depending upon the nature of the proposed projects and needs of ARL members. Librarians will be assigned to the OMS staff person most closely connected with their project's design and theme. Librarians will receive a formal orientation to the Office, and will participate in ongoing planning, meetings, and projects throughout their stay.

It is expected that the librarians will be responsible for obtaining their own grants, sabbatical or other leaves, and other support from their home institutions. In the past, such support has included direct charges incurred at the Office for such items as phone, postage, copying, printing, travel, and clerical help.

Before applying, librarians should have a firm idea of a research/publication project, and the support of their home institution. A first step is to send the Office a one or two-page description of the proposed research project, including:

- Theme, Issue, or Area of Interest
- Rationale for Theme
- Librarian's Interest/Experience with Theme
- General Timeframe and Suggested Approach of Research
- Expected Outcomes and Products

The number of librarians selected will depend upon the nature of the proposed projects and the needs of ARL member libraries. Librarians will be selected based upon this short written proposal, recommendations from references, and an interview. For further information, contact: Maxine Sitts or Duane Webster, Office of Management Studies, Association of Research Libraries, 1527 New Hampshire Ave., N.W., Washington, D.C. 20036.

AUTHOR'S FOREWORD

Having been a student of Russian literature before I became a librarian, I was struck by the superficial similarities between Chekhov's characters and the mythology surrounding public and technical services librarians. Chekhov's characters speak to each other, but they don't communicate, resulting in isolation and alienation. This analogy, of course, only goes so far, but the mythology persists, perhaps because there are enough instances of this alienation to perpetuate the stereotypes.

It has always seemed to me that lack of understanding of the importance of, and skill required in, public or technical services work lay behind the alienation felt by one or the other segment. Thus, I was intrigued by the increasing mention in library media of integrating these functions and decided to investigate the extent to which integration was occurring, and whether it really worked. A fortuitous set of circumstances enabled this investigation to take place.

Our library was being guided in a CAP Study by Jeffrey Gardner from the OMS, who expressed interest in this topic and indicated that OMS might be willing to assist in such a study. I applied for, and was granted, a six-month paid professional development leave under the University of Alberta's Librarian Agreement. I also received funding from the University of Alberta's "Endowment Fund for the Future," whose mandate it is to "support research and other activities of fundamental importance at the University." This funding covered printing, supplies, postage, long-distance charges, and clerical assistance at OMS, as well as the cost of six site visits. I wrote to OMS, outlining my proposed research, and indicating the nature of assistance from them which would be required. Happily, the proposal was accepted, and the pilot project began.

The site visits were completed in January and February of 1985. Doubtless, the libraries involved have moved on to new phases of development. Their experiences are worth documenting because they hold relevance for the many libraries still in the planning phase of organizational change. The survey results published in SPEC Kit #112 would indicate most libraries are in this category.

-- B.J. Busch, October 1986

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INTRODUCTION

During the last decade, the combined impact of technological change, budgetary restraint, user expectations, and a renewed emphasis on service to clients has provided incentives and pressures to shift the focus of professional work in librarianship. Library literature has paid increasing attention to the issue of staffing in the wake of these forces, particularly with respect to the professional component required in technical services.

The advent of cataloging services from bibliographic utilities in the late 1960's provided opportunities for reductions in the number of professionals required in most cataloging departments, while the scope and number of subject areas to be acquired, cataloged, and serviced continued to rise, particularly for the research libraries. Some libraries solved the need for increased numbers of subject specialists in both public and technical services by creating dual-function positions. Other libraries, recognizing that integrated automated systems could eliminate the need to segregate library areas by function, began to examine the possibility of abolishing the functional split altogether. The proponents of the latter scenario saw library work as a continuum, where librarians could and should perform all professional functions in a given subject or language area: selection, collection development and management, cataloging, reference, on-line searching, and bibliographic instruction.(1)

Large academic libraries generally have been organized by the two major functions of technical and public services (with, in some instances, a third area for collection development) for well over 20 years.(2) Despite wide-ranging philosophic debate and statements about the "blurring of lines" between functions or the imminent disappearance of cataloging departments, there is little concrete evidence to show that a major organizational shift is occurring in a large number of academic libraries. (3)

BACKGROUND AND METHODOLOGY

The present study arose out of a Fall 1984 questionnaire addressed to the 117 members of the Association of Research Libraries (ARL). The purpose of the questionnaire was to determine the extent to which ARL members had integrated public and technical services functions, and the role played by automation, institutional mission, administrative turnover, economic considerations and other factors in effecting change. Eighty-two libraries responded to the survey, and the results, along with accompanying documentation, were published in SPEC Kit 112 (Automation and Reorganization of Technical and Public Services, March 1985) by the ARL Office of Management Studies. Forty-six of the libraries responding showed a traditional organizational structure based on the separation of public and technical services functions.

The questionnaires were scrutinized to select likely candidates for site visits for further exploration of trends and practices. Six institutions were selected, using the following criteria:

* Some integration of functions existed;

* Staff reorganization was already underway or complete (many otherwise suitable libraries were still in the planning stages of reorganization);

* Cataloging was taking place in public service areas;

* Professional librarians (rather than support staff) were participating in both public and technical services functions.

The author conducted six site visits during January and February 1985. At each library, between 20 and 40 staff talked with the author in both individual interviews and group discussions. Individuals occupying the positions of Director/Dean, Assistant Librarians, Department Heads, and staff performing in cross-boundary roles were interviewed. In most cases separate interviews were conducted with each category of staff. A list of sample questions can be found in the Appendix.

The observations in this paper are the result of the author's learnings from these interviews, rather than from structured surveys of staff. The "Overview of Developments and Issues" Section provides some initial impressions that could lead to more formal research.

PARTICIPATING LIBRARIES

The libraries selected for site visits were: Pennsylvania State University, University Park; Ohio State University, Columbus; Wayne State University, Detroit, Michigan; University of Illinois, Urbana - Champaign; University of New Mexico, Albuquerque; and University of California - San Diego, La Jolla.

THE CURRENT SITUATION

Based on written responses to the survey and the site visits, it is readily apparent that there is no one model for other libraries to reproduce. Each organizational structure is institution-specific and developed because of unique personalities, administrative climate, status of automation, and staff talents. Some libraries have a history of decentralized processing, particularly for special/professional branches. Thus, integration of functions is not a new phenomenon for them. Other libraries have more recently begun to involve staff in role sharing. Such involvement usually means that catalogers, while still reporting to the Cataloging Department, may also engage in reference desk work, collection development, or bibliographic instruction. The use of technical services personnel for on-line searching of reference data bases is still relatively rare, although there is recognition that catalogers' subject, classification and technological skills make them ideal candidates for this role.(4) Public services staff, except for those dealing with special or

professional materials, are less likely to be involved in cataloging. However, they often play an integrated role when they function as collection development librarians, an activity formerly seen as a technical services function in some institutions.

Two libraries deserve particular attention for their efforts in functional integration. The organizational changes at the University of Illinois and Pennsylvania State University are well-known, not only because of the openness with which they share their experiences, but also because of their systematic approach to implementation of such changes. Illinois, in its more recent restructuring, has seen the decentralization of professional staff in cataloging and subject bibliography to the subject libraries, so that most librarians perform all professional functions. There is no assistant librarian for technical services; rather, the position has been charged with additional responsibilities for what were formerly public service activities (including central reference) and has been renamed Director of General Services, in recognition of its broader responsibilities.

At Pennsylvania State, eight of the 12 professional cataloging positions have been moved to public service areas, where their time has been allotted two-thirds to public service functions and one-third to cataloging. Two acquisitions positions are devoted two-thirds to acquisitions and one-third to rotation through public service areas. An additional 20 professional staff members throughout the library are engaged in selection-liaison activity.

There are major and substantive differences in the approach to integration of services between Pennsylvania State and Illinois. Whereas Pennsylvania State has moved catalogers into public service areas, where the former catalogers continue to catalog as well as perform public service duties (but the public service librarians do not catalog), at Illinois the move is toward what the Chief Librarian Hugh Atkinson termed the "holistic" librarian. A "holistic" librarian, in a nutshell, is responsible for all professional work in a given subject. The Illinois librarians operate out of a subject library, where they decide how much time to spend on each function - selection, cataloging, public service - on the basis of the right mix for that area. While all libraries will participate in this "holisticity," each library can be different.

This mass decentralization of original cataloging to public service areas is not typical of most libraries, which show a more limited or abridged version of functional integration. At Ohio State, for example, only the International Studies librarians participate in all professional activities. The Music cataloger spends 50% of the time cataloging in the Cataloging Department, and 50% at the reference desk in the Music Library. The catalogers also participate in bibliographic instruction.

At Wayne State, technical services operations are completely decentralized only in the Medical Library. The Law Library is responsible for its own acquisitions (except for serials), but its cataloging is still performed centrally. While the above technical functions are decentralized, the Assistant Librarian for Technical Services is responsible for system-wide coordination of these operations. The kardex, although located in a public services area, is maintained by technical services staff.

The University of California - San Diego has some technical services functions decentralized in the branch libraries. There is also some staff rotation, and some catalogers participate in reference. At the University of New Mexico, reference librarians are also responsible for collections work, and report half-time to the head of Reference, and half-time to the Collections librarian. Some technical services librarians also do reference work. Certain non-traditional cataloging (Music, Archives, Documents) takes place in public service areas.

While the focus of this study is on functional integration, there are clearly other organizational changes taking place, some of which are related to this topic, others not. The following are examples of some of these emerging trends, as gleaned from the survey results.

There appears to be a movement away from the concept of the Associate Librarian as the deputy director, as the intermediary responsible for all library operations, including the assistant librarians for public and technical services. The assistant librarians now often report directly to the Chief Librarian. Where the Associate position remains, it is often responsible for business, administrative and personnel matters rather than library operations.

The position of assistant librarian for public services is also undergoing change. Instead of investing the responsibility for all public services in one individual, there now may be two or more AULs, for example, one for the Humanities and Social Sciences, and one for the Sciences. Another method of dividing up public service responsibilities is to separate branch library operations from those of the main library. In both these cases, the net result is to increase public service representation at the cabinet level.

Collection development is now often placed at the AUL level, and not in a box to the side of the director. It is becoming more and more a line function, often with some unusual associates. Sometimes technical services functions have been moved to collection development, along with interlibrary loan and circulation; or, it may have networking or consortial services within its scope, showing the library's broader view of collection management as more than a local issue. The addition of Special Collections, Art and Music collections to the responsibilities of the collection manager is not uncommon, and it is often the logical home for newly emerging units dealing with conservation and preservation, as well as the old standbys, bindery and collection maintenance.

Systems is also moving out of its box under the director and becoming a line function, sometimes with technical services and circulation within its scope. On the other hand, it can also be a part of technical services.

The greatest changes seem to be occurring within technical services. There may be more significant integration taking place within technical services than between public and technical services. Automation lies at the root of some of this change. With an integrated system and files available at any terminal, it makes no sense to push materials through a maze of technical services sub-units. At Ohio State, for example, the four units in the Cataloging Department have been compressed into two, and the Acquisitions

Department has been reduced from eight to three units. A similar compression has occurred at Pennsylvania State and other institutions. The staff member who orders the material can also receive it, and catalog it if copy is available, all at the same work station.

A further development which cannot yet be called a trend, but bears watching, is the expansion of the library's responsibilities into related fields. The most prevalent areas are the university press, archives, and the instructional media center. One library in the study is responsible for the Library Science program at its institution.

There is a final trend which, by its very nature, cannot be documented on organization charts. It is seen in the increasing use of committees and task forces, and the use of project management to accomplish objectives. Staff members work together in a matrix environment with multiple reporting relationships. Libraries have often pulled together key staff for special projects in the past. What is new is the increasing reliance on external staff (who may not report directly to the manager) to do the department's work. The emphasis is on teamwork and cooperation to achieve shared goals.

DECISIONS TO REORGANIZE

The factors which lead to decisions to reorganize are many and varied, but for the six libraries under study they can be reduced to a few salient points. Automation and the expectation of future integrated systems seems to be a major catalyst. Of equal importance, however, are economic factors. Budget reductions, or the fear thereof, coupled with a desire to make better use of existing staff, either for enhanced service or improved efficiency, also play significant roles. Technical services departments, often heavily staffed during the halcyon days when funds for acquisitions were more plentiful, could not help but be targets for reduction with the rate of acquisitions dwindling.

For some libraries, new staff in key positions seem to be a contributing factor. For others, impending staff resignations created opportunities for a reassessment of organizational structure. Other libraries mentioned problems specific to cataloging departments: difficulties in recruitment,(5) staff morale, large staff turnover, decline in demand for original cataloging, obstacles for catalogers in meeting promotion criteria for faculty status, and needs of catalogers to develop further as subject specialists.

Two vital elements contributing to successful implementation of organizational change in the libraries under study are leadership at the top and staff participation. In most cases, the decision to alter the status quo was made by the library director in consultation with the assistant librarians. For these libraries, the vision of this small group permeated the organization and, because the staff had participated in the design of the reorganization, there tended to be a broad commitment to implementation.

Once the decision had been taken to reorganize, it generally was discussed with department heads, and from there it went to the level of department and unit meetings. In some cases task forces or committees were appointed

to make recommendations and proposals; in others, assistant directors worked with department heads, who then worked on implementation with their own staff. Typically, the process was one of continual consultation and communication.

OVERVIEW OF DEVELOPMENTS AND ISSUES

While the libraries under study are in various stages of transition, there is sufficient commonality in their experiences to identify issues for discussion. Both the benefits derived from and the difficulties encountered with functional integration for the most part are largely predictable.

1. Collection Management and Service to Users.

As the contact between formerly isolated segments of the library community increases, so too does an appreciation on the part of all staff of collection and service priorities. High demand materials are no longer recalled for cataloging corrections during peak use periods, key journals do not disappear from the shelves for maintenance or bindery at term-paper time, de-selection decisions are based on actual usage. A rational approach to backlogs develops; staff who relegate material to cataloging backlogs do so on the basis of awareness of demand. Those libraries which have author/title access to materials from the point of ordering via the on-line catalog target only the more esoteric research materials for backlogs, for they understand that scholars normally approach them by known author or title, and the works can be rapidly processed when requested. Two libraries claim to have eliminated backlogs altogether, although the relative roles of reorganization and automation are too intertwined to be distinguishable.

The increasing emphasis on subject groupings pays multiple dividends for library users. Better subject analysis and increased awareness of collections arise from catalogers' exposure to user requirements. Both users and reference staff learn how to interpret the catalog more proficiently from catalogers who have helped to build the database.

The addition of a pool of technical services staff with subject specialties allows expanded opportunities for faculty liaison and more specialized bibliographic instruction. This enlarged pool of staff resources also provides potentially more expertise to assist with specialized reference queries. It was noted that increased commercial database searching was not included as part of enhanced services, perhaps because the core of already-trained searchers is sufficient to meet demand.

For those public service areas having control of subject technical services operations, there are administrative advantages. With the transfer of cataloging staff to the subject libraries, administrators can adapt services to meet the instructional and research requirements which vary from faculty to faculty. A consideration of each faculty department's needs may result in more or less emphasis on collection development, cataloging or public service, and library department heads now have more flexibility to shift human resources accordingly.

In general, libraries are still absorbed in making their reorganization work, but there is some thought given to new services which might arise in the future. These service options, generally of a client-oriented nature such as satellite information centers and end-user training, will not be directly attributable to integration of functions. Rather, they will be possible because of the additional staff available for public service responsibilities.

On the negative side, libraries do experience a loss in productivity during the transitional stage, particularly in the cataloging function. The slippage is less significant in cases where catalogers take on additional functions than where public service librarians assume the cataloging functions. For the latter, training is found to be time-consuming, with a natural slowing of catalog production. There is also a general feeling that cataloging expertise cannot be developed and maintained on a part-time basis without a lowering of quantitative standards. The technical services staff did not share this concern, so it may be a transitory problem which will correct itself over time.

A backlog of uncataloged foreign language materials is developing in some libraries. There is not sufficient foreign language expertise to go around when the cataloging function is integrated into subject branch libraries. This problem will likely be addressed through cooperative efforts, particularly staff sharing among branches.

2. Impact of Automation.

Some libraries had previously reorganized to meet automation requirements; two were in the process of selecting a new system. For the latter, it is anticipated that further reorganization will be forthcoming with the installation of the system selected. For the former, significant reorganization in the technical services area had already been implemented or was planned, quite apart from the integration of public/technical services.

Those libraries with the most advanced functional integration had been through a period of technical services compression, a direct result of automation. New technology forced these libraries to examine the workflow of technical services. The realization that it was no longer necessary to channel library materials through a maze of technical services sub-units paved the way for a further re-thinking of library processes as a whole. These libraries contemplate further organizational change in the future, although its precise direction is yet to be determined.

Functional integration has clearly been enabled by integrated automated systems which can provide bibliographic and other information on many screens instead of in a single card file. Responsibility for the manipulation and control of records, once determined by the physical location of files, can now be allocated according to service needs.

Automation also has played an indirect role in functional integration in that it has pushed libraries to differentiate more clearly the professional from the non-professional tasks, as well as the tasks that machines, rather

than people, should do. Cataloging administrators have realized that support staff can be trained to do much of the descriptive cataloging once considered the sole province of professional librarians. Computers can identify incorrect input faster and more accurately than people can. By relegating appropriate work to computers and support staff, librarians have been freed up to expand the scope of their professional responsibilities. As fewer librarians are required for cataloging department functions, they now have the opportunity to serve the library's clientele in person, rather than from catalog cards.

Unfortunately, the highly-touted advantages of automation can sometimes be dissipated by pragmatic concerns. Many libraries are behind schedule in installing computer terminals, especially in branch libraries, so that public service librarians involved in cataloging are required to return to the cataloging department to gain access to terminals. This is a short term, albeit frustrating, situation. It is particularly ironic in view of the often-made point that automation no longer requires staff to group around files, and thus cataloging can be decentralized in subject libraries.

3. Organizational Climate.

In general, the experience of the libraries under study supports the thesis espoused by many in library literature that better communication, reduced rivalry between departments, and less polarization among units result from functional integration.

This improvement in the climate of interdepartmental relations is not as dramatic when integration of functions is incomplete, with only specialized branches experimenting with multiple roles (multi-roling) while large technical services operations remain intact to service the remainder of the collections. In this latter case, some of the traditional strains continue, with branch library technical services staff joining in the common complaints against centralized technical services operations, which so often typify the atmosphere of public/technical services relations.

Librarians were not surprised that the typecasting of technical/public services personnel was found to have little basis in reality.(6) According to one Head of Technical Services, there is no evidence to support the stereotype of reference librarians preferring to work with people and catalogers preferring to work with books. On the contrary, catalogers often reported that they welcome the opportunity to demolish the old "back room" image by demonstrating their commitment to user service and their ability to perform in the public arena. They see their images enhanced by multi-roling. Catalogers relocated to subject libraries report that their skills and ability to interpret and explain enigmas in the catalog database have won them recognition and respect from public services librarians.

In a sense, these catalogers become boundary spanners, occupying a key position en route from a functional, traditional library organization to what may ultimately be a more clientcentered, matrix-style organizational structure. They can help reference librarians (who have often been left out of automation planning) understand the structure of the new database. They become the resource persons for both public and technical services when dealing with the other unit.

4. Flexible Use of Staff.

An obvious advantage to libraries which have staff trained in multiple functions is the ease with which staff can be shifted to meet time-specific priorities - for example, fall freshmen library orientations, peak reference desk demands, or end-of-fiscal-year pushes to expend funds. The subject-oriented conformations also facilitate rapid response to fortuitous opportunities, such as special grants, since the library manager is able to pull together as many staff as required to take advantage of unique conditions.

With respect to support staff, most libraries see enhanced roles for paraprofessionals arising from automation, compression of technical services departments and clarification of professional vs. non-professional roles in the cataloging process.(7) While fewer but more highly skilled support staff are needed, there has been significant difficulty in at least two of the libraries in convincing university personnel departments to upgrade staff positions. The problem seems to stem from an inability of the central personnel department to grasp the complexities of the library's computerized operations, which are sometimes seen as no different from entering student addresses into the registrar's files. Many of the arguments used in support of multiple roles for librarians can also be used with regard to non-professional staff. Increased use of support staff for service delivery is foreseen by several libraries.

5. Staff Morale.

Results are mixed with respect to overall staff morale. The overlapping of many simultaneous changes makes it difficult to attribute good or poor morale to any one factor. These changes may require the staff to learn new skills, adapt to rapidly-developing technology, or provide new services in an environment of budgetary restraint.

Consensus in individual institutions ranged from statements such as "If we read the director right, there is tremendous job satisfaction in store for professional librarians in the future. Right now, there isn't much", to "We are overworked and underpaid - but everyone wants to be here." Even for those institutions where morale had suffered, most librarians interviewed anticipate that morale will be high in the future. Fear of the future, frustration, a sense of too much happening too soon are all characteristics endemic to organizations in transition. Because the libraries under study are in this category (and many are in the forefront of the profession), it is important to keep this in perspective. Some of the factors contributing to strain are not necessarily directly related to the integration of functions.

As staff seem to support reorganization in other respects, one can assume that stress is a normal reaction to a new situation, and the anxiety should dissipate as the new roles become more comfortable. It should be noted that, in addition to the new job responsibilities, for many there has been a proliferation of committee and project work associated with automation activities and implementation of organizational change.

It was also noted that, where morale was high, it might not be due to the integration of functions as such. A number of assistant librarians or department heads had either changed positions or were appointed after the decision had been taken to reorganize; thus improved morale might have been brought about through their efforts, which happened to coincide with organizational change.

Despite the stress, librarians reported individual benefits to performing in more than one role. Many staff mentioned satisfaction in seeing results of their cataloging used at the reference desk, for example, or having faculty request materials whose need was anticipated by reference-selection librarians who had already placed the orders. This type of "holistic" experience is a relatively new one for staff in large academic libraries. Many librarians, in retrospect, view their former positions as having been too narrow and confining, as contributing to burnout, and as ultimately having resulted in their being pigeon-holed. A number of librarians in multiple roles report they welcome opportunities to move back and forth from work which requires solitude and concentration to the immediate and direct challenges of responding to the public.

With respect to staff resistance, which one would expect in any organization undergoing change, there is relatively little in the libraries under study. The reasons for this are probably due to any one or a combination of factors: trust in the library leadership, administrative track record, participation and collegiality, shared goals and communication. Any resistance encountered seems to be based on individual concerns; there is no mass resistance.

What resistance there had been tended to evaporate after a while when the new system proved it could work, and worst-scenario predictions failed to materialize. Much of the concern appeared to be psychological - for example a perceived loss of status or resistance to learning to catalog.

Most libraries were short of space before undertaking staff reorganization. Some already had experienced crowding due to the addition of terminals and/or changed staff configurations unrelated to integration of functions (e.g. increasing the size of the Systems Department from three to eight staff). Generally speaking, functional integration seems to exacerbate pre-existing space problems by moving additional staff to areas already short of space. Several libraries initiated major renovations to accommodate additional staff in subject libraries. Overcrowding was a problem particularly for those libraries which could not renovate and where staff cataloged materials in an open public service area. Such conditions, of course, are not condusive to staff satisfaction.

It would be fortuitous, indeed incredible, if all staff in an organization had the appropriate skills, subject backgrounds, and attitudes to fit into or adapt to changed institutional structures.

As one could predict, some staff members cannot or will not fit into or adjust to the new organization. This group ranges from staff with subject backgrounds or skills which are redundant, inadequate or inappropriate, to individuals who will resist any change to a position which they know well, are comfortable with, derive satisfaction from, and consequently fear the

unknown new job which is yet untested - and in which they may not do as well. Neither group is large, and the institutions recognize that some flexibility and adaptation on their part are necessary prerequisites to successful reorganization. It is accepted that some staff will have to be carried or accommodated for the short term, especially in larger institutions. One library, however, estimates that this group could constitute up to ten percent of staff involved.

6. Reporting Relationships.

While most institutions have clearly defined hierarchies, staff members in some libraries experience confusion over whom to go to for individual concerns. This is possibly due to the newness of the reorganization in most cases. It may also be that, while reporting structures are obvious to department heads, they haven't been conveyed clearly to staff below this level. This tends to be the case in libraries where leadership is in flux or hasn't taken hold. As one department head commented (in a library where rank and file staff expressed no confusion), "The reporting structure is relatively clear, but tricky."

Normally, librarians are evaluated by the primary functional supervisor, with input from the adjunct area. The adjunct supervisor's evaluation is sometimes formal and written, sometimes informal and verbal. In some cases, the evaluation is based only on performance in the primary function, with no weight given to the adjunct area. Some libraries, with a variety of multi-roling situations, have mixed systems. The inclusion or exclusion of secondary roles from position descriptions varies among libraries.

It is important that librarians functioning in multiple roles be given credit for all the work that they do. If it is important to the organization that staff be flexible and be able to contribute to the library's goals on several fronts, then this contribution must be recognized by inclusion in job descriptions and performance evaluations. All work worth doing can be supervised and evaluated; more attention to communication of what is expected, and clarification of the role of all librarians, supervisory and non-supervisory, in meeting the organization's goals should result in less ambiguity in these matters over the long term.

7. Recruitment and Training.

Since multi-functional roles seem to be difficult for beginning librarians, for the most part, libraries place staff members who have already been trained in at least one function in these positions.(8) To date, libraries report that their reputations are enhanced by innovative approaches to the organization of staff, and that there are many qualified candidates for cross-boundary positions. While the general economic situation at this time may also play a role, the institutions visited feel that the quality of staff being recruited is excellent, and they attribute this in large part to the multi-dimensional professional opportunities they are offering.

Although the level of training (and re-training) varies considerably, generally speaking, more attention is devoted to training in those libraries where cataloging is integrated into public services. Here, the

more rigorous and formal training programs usually are aimed at quality control in cataloging. While this type of training is systematic and standardized, training of technical services librarians for public services roles tends to be somewhat looser, often left to the discretion of each public services unit.

This is perhaps natural, given the subject-specific nature of branch library materials, differing needs of clientele, and particular environments of each library. Some public services units conduct elaborate and in-depth training sessions, but others offer a much more informal introduction to public services functions. There are many possible explanations for this. Compared to technical services operations, reference service is seen as difficult to quantify and standardize. As libraries prefer to hire experienced staff, it may be that less training is necessary. It is also likely that, given finite resources and time, libraries must devote their training efforts to areas where they have external commitments to standards - for example, the requirements of bibliographic utilities. Most libraries which have not yet done so are developing manuals or programs for public services.

The University of Nebraska, in the 1950s, attempting to avoid producing what was termed "library schizophrenics,"(9) chose to begin training in the public services areas. The orientation of new staff in divisional reading rooms lasted several months, after which librarians were introduced to cataloging. By contrast, librarians at Pennsylvania State University begin orientation in the Cataloging Department, where they remain for at least three months before beginning public services duties.(10)

FUTURE DIRECTIONS

When queried on the future, all libraries have a sense of direction. While there are common threads, many future projections are institution-specific, depending on the status of automation and the degree of present integration of functions. The future for some libraries already exists in others. What follows is a compendium of possible future directions as foreseen by all libraries studied.

In general, increased information delivery and an expansion outward in client-centered groupings are seen for public services areas. With no real overall increase in staff available to perform these enhanced services, libraries will come to rely on more paraprofessional and technical services staff as they reach out into satellite information centers.(11)

Electronic information available in various forms, whether traditional library books and indexes or library records and other databases, will contribute to the demise of organization based on proximity. More and more staff will directly serve the public regardless of their primary functions, and all will require training in computer skills. Personal workstations will be multi-functional.

The compression of massive technical services departments will continue. In terms of large-scale integration, there is probably more of this occurring within technical services departments at the moment than there is between public and technical services, as automation invokes a reassessment

of what needs to be done and how it can be accomplished.(12) Lines are blurring more between technical services, as technological developments make it possible for the same individual to perform multiple functions in an integrated environment.

Ultimately, it is expected that a smaller, but more highly skilled, paraprofessional staff will become the norm in technical operations, with responsibility for acquisitions, derived cataloging and circulation control for the system invested in an expanded automation department in large libraries, although it may be called by some other name.

Processing for subject branches may become decentralized over time. Librarians remaining in central processing departments will have responsibility for quality control and supervision; original cataloging will be the responsibility of subject librarians in public services areas. Two libraries consider that original cataloging may be done by subject paraprofessionals. This not to say that in subject libraries there will be no distinction by function. Rather, as is the case now, individuals will perform some functions better than others, and will probably spend most of their time on the function they know best. They will, however, have an adjunct function, be it selection, cataloging, reference, on-line searching or bibliographic instruction. All will be aware of, and guided by, the public service mission.

It is possible that public service/technical service rivalries will be replaced by polarization among subject libraries. Only increased communication and understanding can stave off this new round of antagonisms. As libraries move toward a matrix-management approach to issues and problems, this new concern may prove unwarranted. The interchange of staff for library-wide projects, cross-fertilization by task forces, and staff exchange among subject libraries can all contribute to mutual understanding.

OBSERVATIONS AND CONCLUSIONS

While several types of functional integration have been examined in this study, other variations are also possible. Given some of the concerns expressed by librarians from institutions which are not participating in multi-roling, it may be more important to explain what integration is not, rather than expound on other possible forms of it. Certain misconceptions have arisen which need to be dispelled:

Integration does not mean:

(1) Doing away with the cataloging function;

(2) Cataloging material at the reference desk or any other form of doing two things at once;

(3) Reporting to several supervisors for the same job or receiving conflicting instructions from several supervisors;

(4) Doing what one prefers regardless of library priorities.

There are several integral ingredients which contribute to successful organizational change in the libraries under study. As noted earlier, leadership and staff participation are vital, as is a clear sense of where the institution is going. Staff members need to have some vision of what their jobs will look like in the future. They must have confidence that the library director's judgment is sound. This does not mean that library administrators need only a written, detailed five-year plan, but they should have a well-defined idea of what will happen next after the current situation becomes settled, and articulate those ideas.

There are certain characteristics held in common by these libraries. In the first instance, staff members communicate a great deal. There is not only formal communication which ensures that all are kept informed and consulted, but there are also informal channels.

Cross-divisional committees and task forces abound, as do library-wide projects.(13) As people are involved in the concerns of the library as a whole, there is less emphasis on interdepartmental competition. Matrix-style mini-organizations for specific undertakings are becoming more prominent, although the term "matrix" is usually not used. Of course, matrix management does not show up on organization charts, so this trend is difficult to document from the outside.

There is also a move toward discipline-oriented services of smaller units. While this is not actually occurring in all libraries, it is seen as a future trend. Small groups can be more cohesive and effective, exerting control over their own operations while maintaining a connection with the larger institution through a shared vision and technical linkages.

There has been a substantial infusion of "new blood" in many institutions. In some cases, librarians are new to their positions; in others, new to the institutions. New staff could not respond to some queries regarding how change came about, for example, and had to guess at why or how changes had occurred. There is also uncertainty at times whether to attribute progress to staff reorganization or to new staff.

All the studied libraries are in a state of transition. Some staff believe it is too soon to evaluate the effects of their first reorganization, while others are planning to launch a second or third restructuring.

There is unanimous agreement that change will be a fact of life for the rest of this century. It may be that the multiple roles being experimented with today represent a transitional phase into a yet unknown future structure. One library likened its staff to a football team - moving in changing formations.

In most libraries, there is substantial direct contact between the chief librarian and the assistant librarians. The traditional role of the associate librarian as an intermediary seems to have largely disappeared. Thus, the chief librarian and the assistant librarians function as a close-knit management team, with the assistant librarians serving as two-way conduits between the department heads and the director.

The requirements of faculty status seem to facilitate and encourage acceptance of functional integration. In some libraries, technical services staff found it difficult to meet teaching requirements until they were encouraged to participate in bibliographic instruction. The emphasis on subject groupings, often modeled on faculty departments, also is seen as helpful.

It is unlikely that any one of the patterns exhibited by the libraries under study will serve as the model for the future, or that, in the aggregate, all the predictions will come true. Fragments of each system probably will prove useful and may be copied by other libraries; some of the predictions will be realized, in whole or in part, for some libraries; any library undergoing change will experience many of the problems, and will add more both to the litany of stresses, and to demonstrable advantages. Library organization is shaped by the history and staff in institutions, by technology, budgets, morale, faculty influences, and the wisdom and vision of its leaders. Integration of functions is but one manifestation of what these factors can produce.

FOOTNOTES

1. This scenario is not new. For example, Frank Lundy of the University of Nebraska was a major proponent of "the practice of librarianship clear across the board" in the 1940's. See Edward R. Johnson's "Subject-Divisional Organization in American University Libraries, 1939-1974," Library Quarterly 47: 33 (1977).

2. See Connie R. Dunlop, "Organizational Patterns in Academic Libraries," College and Research Libraries 37: 397 (1976).

3. In the first issue of Technical Services Quarterly (1983), which is devoted to the future of technical services, one can find at least nine separate references to the distinction between public and technical services blurring, fading, etc.

4. Mary W. Ghikas sees the development of database organization and search strategy skills as a common goal for both public and technical service librarians, one that will further de-emphasize their traditional split. See her "Technical Services in the '80s; Challenge and Change," Illinois Libraries 62: 589 (1980).

5. Frank Lundy noted the same problem twenty-six years ago: "During the past decade °catalogers' have become increasingly hard to find in the employment market. In fact, they have almost reached the vanishing point in some geographic areas." See his "The Dual Assignment: Cataloging and Reference: A Four-Year Review of Cataloging in the Divisional Plan," Library Resources & Technical Services 3: 182 (1959). Eleven years earlier, Raynard C. Swank referred to "the recruiting problem, now so critical in the cataloging field" in his "The Catalog Department in the Library Organization," Library Quarterly 18: 31 (1948).

6. Gordon Stevenson refers to the notion that reference librarians like to work with people and catalogers like to work with books as "one of the untested assumptions of the folklore of librarianship" in his article "The Nature of the Problem, If It Is a Problem," The Reference Librarian 9: 5 (1983).

7. In his article "How Will Automation Affect Cataloging Staff?" Gregor A. Preston foresees the disappearance of the division between non-professional technical and public service staff due to automation. As efficiency and concentration cannot be sustained at the terminal for prolonged periods, technical services support staff would also have public service assignments in his ideal library of the future. See Technical Services Quarterly 1: 133 (1983).

8. This contrasts with the experience at Nebraska, where split assignments were frequently given to new library school recruits. See Enid Miller's "Public Service and Cataloging at the University of Nebraska," Library Resources & Technical Services 3: 191 (1959).

9. Kathryn R. Renfro, "Cataloging in the Divisional Library," College and Research Libraries 15: 156. (1954).

10. For more detail on their computerized training program, see Louise Garraux Glogoff, Barbara C. Dean, and Anne L. Highsmith, "Computer-Based Training Program for Cataloging Department Staff," Journal of Academic Librarianship 10: 23-38 (1984).

11. Satellite information centers are not new branch libraries, but an extension of service from current branch libraries. Often located in faculty departments, they provide specialized service to an identifiable clientele on a part-time basis. While they may house a terminal and some reference works, they do not normally contain collections other than current journals, if that.

12. Peter Spyers-Duran noted this trend eight years ago. See his "The Effects of Automation on Organizational Change, Staffing, and Human Relations in Catalog Departments," in Requiem for the Card Catalog, Westport, Conn., Greenwood Press, 1979, p.31.

13. It is interesting to note that Alex Ladenson, in an article written thirty-eight years ago as a rejoinder to Raynard Swank, advocated the temporary shifting of personnel, at least among technical services departments. See his "The Acquisition and Preparation Departments," Library Quarterly 18: 203 (1948).

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APPENDIX

Issues Addressed

The following questions were explored with library staff in both individual and group settings. The author observed that, within each library, there was a unanimity of response to most questions, regardless of position held.

1. What is your current organization?
2. What factors led to reorganization?
3. How was change effected?
4. How has it worked out?
5. What kind of training or re-training has been required?
6. Did you encounter any staff resistance?
7. What impact has reorganization had on staff morale?
8. Has there been any effect on library service?
9. What role has automation played in staff reorganization?
10. What are the reporting relationships?
11. Have there been space implications?
12. What impact has the reorganization had on support staff?
13. What changes do you see occurring in the future?